



# Opportunities and Challenges in SMART HEALTH

14th March 2023, 10h CET











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- 10.10 Smart health procurement opportunities in Chile, Colombia, Norway, Serbia, Japan and Vietnam
- 10.20 How was Croatian Health Care digitalised
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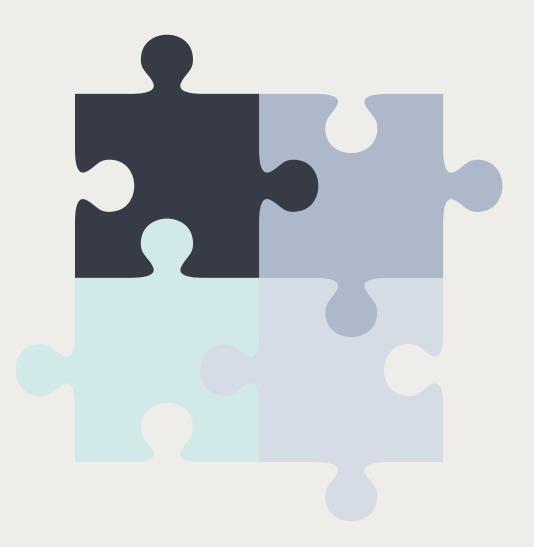
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# **Focus sectors**

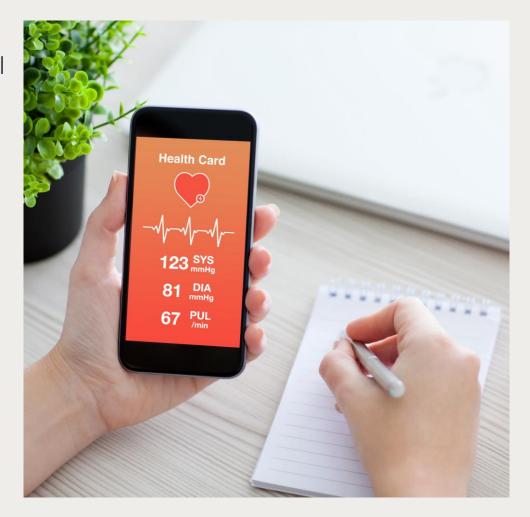


- Ol Green Economy: Air quality, Climate change, Circular economy, Energy efficiency, Renewable energies, Water, waste management, etc.
- Smart health: Hospitals, Remote assistance, monitoring and follow-up, tele-medicine...
- **ICT:** Communication infrastructure, Cybersecurity, E-identity, IT Services, Telecommunication Services, etc.
- Smart Cities: Smart building, Smart energy, Smart government, Smart infrastructure, Smart mobility, etc.

# **Project activities**



- Joint internationalisation strategy
- Organization of both face-to-face and virtual match-making events
- Training webinars and advisory services to SMEs
- Organization of company missions to the target countries
- Assistance for bidding to specific calls for tenders outside the EU
- www.projectgoose.eu



# What is GOOSE → www.projectegoose.eu



- > EU funded project to explore public procurement opportunities for European SMEs in 6 non-EU countries.
- ➤ Main Goal: to encourage European SMEs to access to third countries' tenders by identifying real public procurement opportunities and facilitate SMEs access to those opportunities.
- >We will help you to be successful in bidding to tenders in Vietnam, Colombia, Chile, Norway, Japan and Serbia via unique services, such as tender tracking, mentoring, and meet-the-buyer missions to target countries.

#### **≻**Partners

- >ACCIÓ Catalonia Trade & Investment
- ➤ Flanders Investment & Trade (FIT)
- ➤ Estonian Chamber of Commerce and Industry (ECCI)
- ➤ Croatian Employers' Association (CEA)
- Project duration: 36 months (June 2021 May 2024).
- >6 selected countries.
- ▶4 target sectors.



#### INESS ENVIRONMENT OPEN TO EUROPEAN SOLUTIONS TO ERVICES

nal power, being characterized as neither a developed economy nor an emerging one.
Impetitors in many sectors, as well as opportunities for collaboration with European firms

nce, but with complex topography, with the Amazonas river basin and the mighty if of the country. Also, to consider the high urbanization rate, at 75%, which include argest cities.

s relatively stable, far from the U-turns seen in neighbours Venezuela or Ecuador. It has a mosphere, and that includes a local base of qualified staff, from blue to white collars.

en working for more than 10 years with the OECD in order to modernize its public concerning public procurement's machinery, although there is room for improvemen

#### IN COLOMBIA?

e than 50M inhabitants, a constan rule of law, Colombia has an with those firms interested in the

ns are not as robust as, say, Chile, it ints to better them off, lately. In this chile are the only members of the erica (Costa Rica being the last one) ry's public bodies are committed to espect international treaties.

nology and goods/services of limited, opening the room of opean suppliers. Colombia's public tacks about such as in the Engray

#### COLOMBIA AT A GLANCE

- Surface of 1,143,000 km²
- Distance from Brussels 9,000 km
- 50.9 M Inhabitants
- E 777 I ISEMponito
- Index of Economic Freedom 2021: 68.1/100, 49th in the world. 2nd in Latin America.
- The Legatum Prosperity Index 2021: 77th of 15
- World Economic Forum's Competitiveness
   Indox 2019 52 7/100 57/1 of 141
- Corruption Perceptions Index 2020: 39/100
   act 179

#### INFORMATION

Unified tender portal:

#### **Hospitals**

- In Feb. 2023 Colombia's president Gustavo Pietro presented the master lines of its announced Health reform, one of his 2022 campaign's key focuses, contemplating: universal health care; guarantee primary care to all Colombians; better working conditions; prevention of diseases; reduce the health gap between rural and urban areas, and affluent vs poor.
- Considering the country needs to import almost everything to make it work, there is huge potential to supply hospitals, be it in drugs, equipment, Medtech, specialised services.
- European firms need to also consider this period of changes, which invites new suppliers, with new ideas and a different approach.

#### **Improving Process and Paperwork:**

- This is a challenge for every health system in almost any developed country. GOOSE believes there is potential in this segment for European firms. In this sense, the new Presidency's aims at reaching universal medicine, for which it will need to improve the health system's productivity.
- The push for more value for money, induces GOOSE expecting more and better use of ICT, including Digitalization, and better coordination via it of the different levels of the system.



#### IEER IN PUBLIC INITIATIVES RELATED TO GREEN AND HEALTH

are revered as solid, corruption free, especially considering the region's past n economic model dictated by the Chicago school, favouring freer markets with ention, in almost all instances of society. Its government spending's share of the GDP ne OECD, after Ireland's, and followed by Colombia's (the other Latin-American target

eloped country in LatAm, and stable; notwithstanding the critical turmoil of 2019, le, have also spurred more and better public policies, to solve the income gap, via and better public services. Gabriel Boric Font's new left-wing pro-green presidency andency towards more and better provision of public services.

exploitation of natural resources, specially minerals, being first in the world in coppe nd in lithium (after neighbour Argentina), and ahead of also neighbour Bolivia. It is via its export-focused agroindustry.

#### IN CHILE

diffice is highly well-thoughtits transparency and efficiency: as are plain consistent with the preements in the matter. E.g., its stracts has been highlighted by nor

ers approach permeates in the at milieu: the country has 15 FTAs with oters (out of a total of 29), including ense, the Chile-EU's of 2002 is being atters such as work's concessions.

ally OECD-members, it is pushing pating in the country's public y tender procedures, for more

#### CHILE AT A GLANCE:

- Surface of 757 000 km
- Distance from Brussels 12,000 km.
- . 191 M inhabitants
- 17 470 HSD/capie
- Index of Economic Freedom 2021:
- 752/100, 19th in the world, 2nd in America
- The Legatum Prosperity Index 2021: 38<sup>th</sup> of 157
- World Economic Forum's
   Competitiveness Index 2019: 70.5/100
   The COLOMBIA COLOMBI
- Corruption Perceptions Index 2020
   677000 25th out of 179

#### INFORMATION:

#### **Hospitals**

- Chile is also **undergoing a deep reform in its Health sector**, following Gabriel Boric's election as president just a year ago (Mar/2022) with a firm left wing mandate.
- Accordingly, the reform aims at strengthening Universal Primary care, and a better integration between Private and Public provision, towards a mixed system, in the line of those applied in Europe.
- Chile's National Investment plan continues to support the construction of new hospitals and primary healthcare centres across the country. Chile will soon reach the end of the NIP 2018-2022 which aimed to strengthen the healthcare network in the country by building and planning the construction of 75 hospitals by March 2022.- Rising hospital bed availability will improve healthcare access nationwide.
- Drug makers stand to benefit from higher demand for drugs and access to previously unserved communities.
- As with the case in Colombia, imports rule; considering the current reforms, European firms, providing MedTech, Pharma, and Specialized services, should put an eye in the market, which may also aim at new solutions from new entrants in the sector.



#### ER IN MANY FIELDS AND ACTIVITIES WITH INTERNATIONA ARKET

nany of the world's rankings related to wealth, quality of life and ease of doing business is Nordic neighbours, Finland, Sweden, and Denmark. Norway, which ranks as with the nequality in the world, has achieved this through a mix of policies that support educatio

rs, the government has focused on promoting **innovation and high-technology industry** om a reliance on non-renewable resources.

#### NG IN NORWAY?

int constitutes approximately way, which compares to the % of GDP. Norway had 11,323 ling more than 2 billion EUR in ruction and IT sectors leading

Norway has a high level of ntegrity, after the country's ainst corruption. Furthermore, asset on EU's rules on public siggest handicaps to adapt to it unicipalities.

English are just accepted on is an interesting niche in the t of innovation, prone to be

way is not very different from e in Europe. Through the **EEA** jian law complies with the EU

#### NORWAY AT GLANCE:

- Income group (OECD classification) High-income
- Population 5,314,336 inhabitant GNP per capita \$420,978
- Index of Economic Freedom 2021: 73.4/100, 28\* in the world, 15th in the region.
- The Global Index of Economic Openness 2019 (Legatum Institute): 6\* best of 157 countries Competitiveness Index 2019 (World Economic Forum): 781 - 17\* best of 140 countries Corruption Perceptions Index 2020 : 84/100 78
- Corruption Perceptions Index 2020 : 84/100, 7th out of 180 countries

Nation-wide public procurement platform Doffin www.doffin.no

#### INFORMATION

Partner in charge: Estonian Chamber of Commerce and Industry info@projectgoose.eu https://projectgoose.eu/horway/

#### **Hospitals:**

- There are **13 new hospital projects underway**, with an estimated cost of USD 8.8 billion. They will invest in new technologies and digitalization of workflows to increase productivity and efficiency gains, being equipped with state-of-the-art medical equipment, robotics & logistics systems, smart building technologies and waste management systems.
- There will be opportunities for companies that have innovative products or services related to medical devices, operating room equipment, medical imaging, medical furniture, patient monitoring systems, transport, and logistics systems.
- Firm should take into account their technical edge, rather than other factors, such as cost.

#### **Telemedicine:**

- Given aging population, a rise in chronic diseases and increasing healthcare costs, the Norwegian government has stated that telemedicine, e-health and welfare technology, are national priorities, being key tools for the Integrated Health Care Reform.
- The authorities are implementing electronic patient journals/EPJs, and have successfully launched e-prescriptions, a national health portal where citizens will be able to have access to their digital health information. Telemedicine is seen as an important part of future acute medical care, radiology (work-sharing among hospitals) with specialist consultations within the ear-nose-throat field (video conferencing); specialist consultations in dermatology (e.g., video conferencing and still picture technology); and cardiographs (e.g., heart rhythm/sound comparisons).
- Also, clinical information systems, home care and personalized health systems, services for remote patient monitoring, systems for integrating local-, regional-, and national health information networks, represent significant potential for European firms.



#### ARKET FOR PUBLIC PROCUREMENT WORLDWIDE

d largest market for public procurement, after China and the USA, with a total estimate billion US dollar or 698 billion euro in 2017.

al government tenders alone lead in 2018 to nearly 10 billion euro ICT and computer related Fbillion euro health related orders and nearly 3 billion euro of green economy related order

s and products were able to penetrate in the Japanese government procurement computer and for health. Procurement related to the green economy was less open for rs, but the development of off shore wind mills in Japan might change that.

#### ING IN JAPAN

an Economic Partnership g into force in 2019, the EU has less to contracts put out for both the central government scal governments. Furthermore, ory access for EU suppliers to the lests of 48 cities of around 300,000 ided.

provides a new requirement intended or planned procurement coessible by electronic means, free a single point of access. Public of procurement (searchable under f procurement") by all procuring isulted on JETRO's website. Japan of the following procurement oner guarantee transparency, fairness iss. (1) invitation to submit materials of specifications, etc. (2) invitation opposed specifications, and (3) nated suppliers when the Selective are is implemented. To conclude, the prical score) assessment will take

#### JAPAN AT GLANCE:

- Income group (OECD classification) High income GNI/capita of \$12,236 or more
- GNP per capita \$41710
- The Global Index of Economic Openness 2019 (Legatum Institute): 15th best of 157 countries-Competitiveness Index 2019 (World Economic Forum): 781 - 6th best of 140 countries
- out of 180 countries

#### INFORMATION

Partner in charge: Flanders Investment & Trade info@projectgoose.eu

Connect with the EU-Japan Centre for Industrial

The centre has a lot of information available and have a dedicated <u>"The Japan Tax & Public</u> <u>Procurement (JTPP) Helpdesk"</u> which provides a range of services in the area of public procurement.

#### **Hospitals**

• Japan has a well-known challenge with a growing elderly population; related to it, there are niche opportunities for European suppliers, especially in the MedTech side. This does not imply an easy access to the local procurement markets. European firms may already be aware of the local particularities, such as: no other language used than Japanese; sped practice by public officers of consultation with potential suppliers prior to a tender's deadline; local preference as the norm; etc.

#### **Improving Patient care and Monitoring**

 On a similar tone as the previous segment, GOOSE will explore the niches of opportunity here, also considering the aging population of Japan. Albeit Japanesefirms' ingenuity is difficult to match, there may be niches in which European solutions better the local base, and this will be the focus of GOOSE's strategy for Japan.

#### **Improving Process and Paperwork**

Japan is known for its capacity to execute, thence the reliability of its public
administration. However, it is also known for its traditionalism, which implies
reluctance to adopt new methods and tools. GOOSE will be identifying niches
into which position European suppliers, offering top-notch solutions to lift up
public services.

#### **Telemedicine**

 Telehealth in Japan is not as developed as, say, other Asian developed countries, such as Singapore or China. This in part due to Japanese traditionalism, which favours business as usual to innovations, but also due to local lobbies (e.g.. the Japanese Medical Association). GOOSE will keep attention to developments in the field, spurred by public demand, to encourage participation by European firms.



#### IN ITS PUBLIC SERVICES WITH ROOM TO PARTNER WITH

s, the necessity to upgrade of its basic infrastructure, as well as to facilitate the

pecially within the EU's old block. That translates into low unemployment, even

ant role played in Serbia by Greece (until the financial crisis), and then Germany,

#### CIPATING IN

andidate means a constant r.e.g., it adopted a new Law on

ed procuring entities to s, such as the enforcement of accessible (a single point of

pillion EUR in green economy

#### SERBIA AT A GLANCE:

- Surface of 88,361 km2
- Distance from Brussels 1,725 km 6,9 M inhabitants

#### INFORMATION:



#### AN ENORMOUS PUBLIC MARKET FOR SUSTAINABLE INFRASTRUCTURE PROCUREMENT

#### WHY TENDERING IN VIET NAM?

- GNI per capita \$2.650 (WB 2020) llion USD **\$257,926.58** (WB 2020) \*Feonomic Freedom 2021: Score:

- Competitiveness Index 2019 (World Economic Forum): Score: 78.1/100 ranking: 67th best of 140 countries Corruption Perceptions Index 2021: Score: 39/100, ranking: 87th out of 180 countries

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## Where to find information?



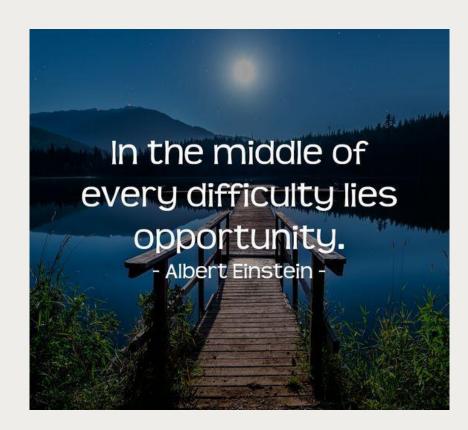
OUR WEBSITE: https://projectgoose.eu/

#### LINKEDIN:

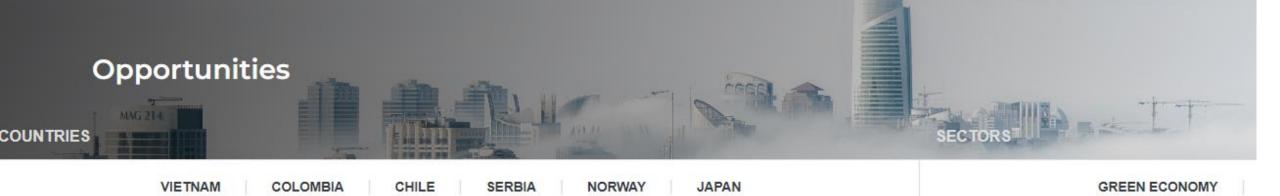
https://www.linkedin.com/company/projectgoose

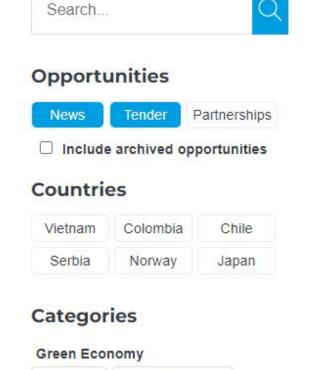
#### **COMING SOON:**

- PODCASTS: Understanding the Local Market, How to win contracts, Insider Tips for Success, Navigating the Regulations, Common Mistakes and How to Avoid Them
- NEWSLETTERS



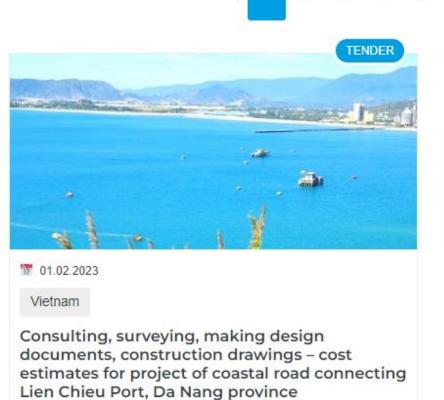
Contact us directly: info@projectgoose.eu





Air Quality | Circular economy

Clean transportation





The package No.12: Supply and transportation

primary equipment & materials, insulators,

OPGW and accessories (Notice ref No.:

IB2300008395 - 00. Date of publication:

Vietnam

# Don't miss the opportunities!



# SUBSCRIBE!

Sign up if you'd like to receive alerts and updates about the tenders and useful news about the project. You can order notifications about the tenders and news by selecting categories and countries. You can always change your data.

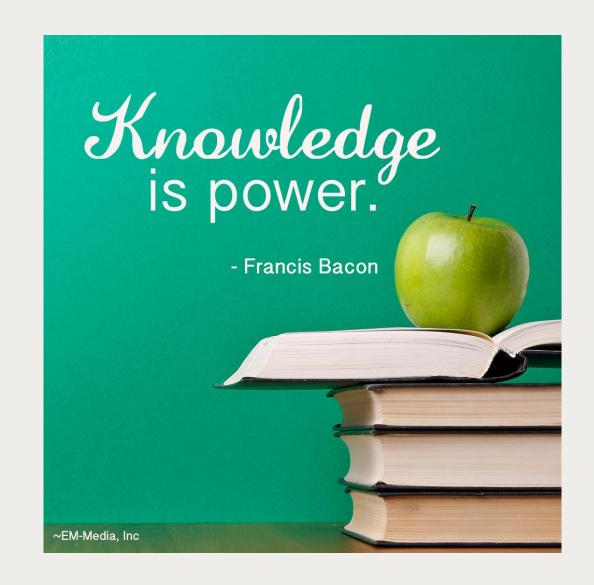
# SEIZE THE MOMENT BECAUSE SOME OPPORTUNITIES DON'T COME TWICE

PICTURE QUOTES . com

# **Need more information?**



- ▶ 6 Country Fact sheets: one document per country containing information on why consider tendering in the country, tips for it and a snapshot on the sector/segment opportunities. Factsheets are available for registered users only.
- 6 Country "Long lists": including every key issue regarding public procurement: main institutions, procedures, barriers, characteristics, sector/segment opportunities, etc. Not publicly available; to be shared upon request.





### NECESSARY UPGRADES IN ITS PUBLIC SERVICES WITH ROOM TO PARTNER WITH LOCAL PLAYERS

The country has pending reforms, the necessity to upgrade of its basic infrastructure, as well as to facilitate the development of a real market economy.

Serbia bascules between the West and Russia, with both of which it has FTAs.

As happens in many of its neighbours it has a relevant brain drain, as most nationals emigrate towards better working conditions elsewhere, specially within the EU's old block. That translates into low unemployment, even to hinder coverage of job vacancies.

It is worth highlighting the relevant role played in Serbia by Greece (until the financial crisis), and then Germany, Austria, Italia and ex-Yugoslavian countries, especially Slovenia.

#### WHY CONSIDER PARTICIPATING IN TENDERS IN SERBIA?

Serbia's status as pre-accession candidate means a constant process to adapt to EU legislation: e.g., it adopted a new Law on public procurement in Dec/2019, introducing e-procurement practices such as electronic communication and the exchange of data in public procurement procedures.

Relevant ministries have instructed procuring entities to implement additional obligations, such as the enforcement of reinforced transparency rules including making information about public tenders more easily accessible (a single point of access for procurement information), fairer assessments of EU companies' technical abilities and experience.

Many public works projects are financed through borrowing from the Multilateral Development Banks, including the EIB, EBRD (EBRD has invested 2,7 billion EUR in green economy and sustainable infrastructure since 2001) and WB.

To consider that China is increasingly imposing itself as a creditor for infrastructure projects, which crowds out EU/ Western investments in certain areas.

High percentage of tenders (55%) with only one offer (the EU average is 23.9%).

#### SERBIA AT A GLANCE:

- Surface of 88,361 km2
- Distance from Brussels 1,725 km
- 6,9 M Inhabitants
- 13,470 USD/capita
- Index of Economic Freedom 2022
   65.2/100. 59th in the world
- The Legatum Prosperity Index 2021: 52nd of 157
- World Economic Forum's Competitiveness Index 2019: 60.85/100, 72nd of 141
- Corruption Perceptions Index 2020: 38/100, 96th out of 179

#### INFORMATION:

Main portal for PP is Portal javnih nabavki (ujn.gov.rs)

Contact GOOSE to explore and access these market's opportunities.

qoose@qoose.eu www.projectgoose.eu







#### TIPS FOR ENGAGING IN SERBIA'S PUBLIC PROCUREMENT

- 1. Not to be discouraged by language issues: to start, tenders for or paid by international institutions (EBRD, UE, WB) are prone to be fully developed in English; whereas those of a more "local pattern" will be in Serbian, but then you can cut short with Serbian-speaking staff of by partnering with a local/Balkan firm.
- Consider the win-win to partner with local firms: most local firms do not have the right experience, or even the financial capacity, so partnering with a foreign player will lift up their chances to success.
- 3. Also consider partnerships with Croatian firms: with GOOSE's partner CEA we can help you identify companies with which to focus Serbian tenders, leapfrogging language and cultural barriers.
- 4. Consider markets beyond Belgrade: for example. Novi Sad, capital of the northern autonomous region of Vojvodina, has a more "Mitteleuropa" culture, which can favour approach local tenders directly.

#### **GET READY FOR SECTOR BASED OPPORTUNITIES!**

- In Smart cities, the country has important challenges, such as: full implementation of the eGovernment Unified Information and Communication Network; spread of G5 network across the whole country; provide an artificial intelligence platform on the eGovernment infrastructure, to further contribute to faster and more efficient development of smart cities.
- There are interesting initiatives beyond Belgrade, such as in Niš' SC project, which includes the construction of urban infrastructure and the development of an information systemstudy will examine seven different services (most likely smart city lighting service). Note that this is part of China's BRI.
- The Serbian government has pushed hard towards digitalization across every sector. It is worth higlighting that IT is 4th in exporting sectors, in part thanks to important investment by some big international players. These are fagocitating much of the local IT human capital, hindering SMEs developmeent in the sector. There are noetweorthy relevants in IT infrastructure from multilateral institutions, such as the EBRD or EIB.
- In the Green economy, Serbia is still heavily reliant on coal, with a lot of energy being wasted. These are two of the areas with heavy investment from multilateral institutions, such as the WB, EBRD and EIB.
- Specifically, Green recovery after COVID 19 is focused on reducing air pollution and creating a legal framework for climate policy.
- In the Health sector, around 90% of the medical device market is supplied by imports from either the US or EU, with a great role of big players such as Siemens and Philips. To bear in mind that the proximity of the European firms to the Serbian market allows them frequent visits to meet end users, to participate in exhibitions and scientific meetings, and to provide prompt after-sales services to buyers. That being said, competition from Chinese companies should be considered a serious challenge for future market entry strategies.

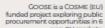
#### TARGET SECTORS







Smart



# If you find an opportunity, what next?



#### Follow-up services

European SME's companies can request, at any time, the support of our team. Please contact us <u>info@projectgoose.eu</u>

These follow-up services include:

- Individual meetings between our team and SMEs after specific request on any market / tender of their interest.
- > GOOSE will involve their experts in target countries to analyse real potential in the field and give feedback to the SME, including recommendations and next steps.

Contact us after any market/tender of your interest!

# If you need more...



## Let's involve a local expert!

Local experts can help you with following tasks:

- > Assistance on how to prepare bids for a specific market.
- > Legal consultation related to the tender.
- > Assist in drafting/writing and/or reviewing parts of a company's bid to a public tender.
- > Ensure that the bid/proposal meets the legal requirements in the target country.
- > Offer legal feedback on the procurement market in the sectors covered by GOOSE.
- Identification of local partners and/or clients.
- Assist in identifying potential local partners, for joint-bidding, partnerships, subcontracting, etc.



# Let's explore the market together!



JOINT BUSINESS MISSIONS TO TARGET COUNTRIES

You are welcome to join our program:

- **SERBIA:** Week of the 8/May
- **COLOMBIA**: 29-2 June during Bogota smart City expo
- **NORWAY**: Week of 25/Sept within Oslo Innovation week
- **JAPAN:** TBC (end of year or begginning of 2024

Matchmaking event during **Smart City Expo Barcelona**: 7-9 November 2023









KEEP
CALM and
LET'S GO WORK
and
MAKE MONEY

# GOOSE's Next webinars and actions, stay tuned!

- 2023 business trips to Serbia, Colombia, Norway and Japan!
- Podcasts, Tender alerts, and much more!



# Aitäh, dankjewel, hvala puno, gràcies, gracias Thank you!











info@projectgoose.eu www.projectgoose.eu